

# Beaumont

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Document Contact	Kimberly Cole: Spec, Operations
Area	Laboratory
Applicability	Dearborn, Taylor, Trenton, Wayne

## Laboratory Off Site Records Storage

Document Type: Procedure

### I. PURPOSE AND OBJECTIVE:

The purpose of this document is to provide a procedure relating to the creation, maintenance, and destruction of laboratory paper records and documents.

### II. DEFINITIONS:

- A. Documents: Documents provide a description of or instructions regarding what is supposed to happen and how to make it happen. Examples of documents blank forms and job aids.
- B. Records: Records provide evidence of what did happen. Examples of records include completed forms, patient test results, quality control results, results documented in the computer, and audit results.

### III. PROCEDURE:

#### A. Record Creation

1. Records must be legible and indelible. All manual records are to be kept with black or blue ink pens. The only exception to this policy is that red ink may be used to perform supervisory review.
2. Records must be created concurrently for each critical task performed.
3. The actual test results of each test performed must be recorded immediately, either on a form designated for this purpose or in the computer. Test results must be recorded at the time the test is performed in order to reduce the risk of transcription errors from delayed recording.

#### B. Iron Mountain (IM) Retention of paper Records and Documents

1. Iron Mountain is a storage and information management company. Records may be sent off-site to Iron Mountain for retention. The records are retained at Iron Mountain for at

least the minimum retention period as per the [Record Management, Retention and Destruction Policy](#) and the [Laboratory Document Management and Record Retention procedure](#). **In order to send records off site you have to have access to iron mountain connect (IMC) online. Access is controlled and maintained by the Corewell Health Record Management and Print services Department. Please contact them to request access.**

**C. Accessing iron mountain connect (IMC)**

1. Getting started
  - a. Enter a Service Now ticket for access.
2. Initial Sign On
  - a. Follow instructions provided upon approval.

**D. Iron Mountain Labels**

1. To begin the off-site records storage process you need to order Radio-Frequency Identification (RFID) bar-code labels from Iron Mountain. To do this:
2. Log on to iron mountain connect (IMC).
3. Go to Records Management.
4. Order Supplies, (lower-left under orange bar),
5. Select your customer number and department identification provided by self service chat.
6. Select address, (if not listed click add address and add your location),
7. Select your item(s).
8. Proceed to checkout.

**E. Ordering Empty Boxes**

1. You may order boxes from Iron Mountain, if you do, you do NOT need to order labels as the boxes come with labels already affixed. However, it is preferred that you order plain boxes from preferred vendor office supply as they are less expensive, and then order just the labels from IM. Labels come 10 to a pack and can be affixed on the front of the Staples box.

**F. Record Keeping**

1. Keep an electronic or paper spreadsheet of the boxes and their contents that you send to IM so that you can retrieve them in the future.
  - a. From the RFID label, document the numbered portion of the RFID label and a description of the box contents for your records.

**G. Entering new boxes on Iron Mountain Connect**

1. Log on to Iron Mountain Connect.
2. Go to Records Management.
3. Pickup.
4. Add records.
5. Select Add box and follow the prompts for data entry.

6. Required input is noted with an Asterisk.
7. Repeat for each box then proceed to checkout.
8. Retention Code: One of the most important items required is the retention code for each box entered into inventory. The retention code determines the length each box is required to remain in inventory and when each box is eligible for destruction. You MUST enter a retention code number for each box submitted (See "[Record Storage and Destruction Procedure](#)")

#### H. Retrieval of Records from Iron Mountain

1. Records may be retrieved from Iron Mountain as described below.
2. Use the RFID barcode label that was placed on the box as the keyword for searching. The RFID barcode label number usually begins with an R.

a.

**Retrieving Stored Records**

IRON MOUNTAIN CONNECT

RECORDS MANAGEMENT

Search: Search Tools Search ID

Records Type: DIST CTR

Customer: RC2M2 [RC2M2]

Department: All

Status: All

File Group: [ ]

Search

Search, Retrieve

Pickups, Add Records

Bulk Upload

Order Supplies

Administration

Track Orders

1 Select Search, Retrieve. Use the left-side navigation bar to move within the different functional areas in Iron Mountain Connect Records Management.

2 Enter a Keyword and set additional filters as necessary. Refer to the Searching training guide for more detailed information on using Search functionality.

b.

**Retrieving Stored Records**

IRON MOUNTAIN CONNECT

RECORDS MANAGEMENT

Search: Search Tools 306 Search Results

Records Type: DIST CTR

Customer: RC2M2 [RC2M2]

Department: All

Status: All

File Group: [ ]

Search

Search, Retrieve

Pickups, Add Records

Bulk Upload

Order Supplies

Administration

Track Orders

Action	Item Type	Customer	Division	Department	SKP Barcode	Alpha From	Customer: Box Num...	Status	Action
	BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	CTR				At Iron Mountain	Add to Cart
	BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 HICKORY RIDGE DIST CTR-MD	109647104		109647104	At Iron Mountain	Add to Cart
	BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 HICKORY RIDGE DIST CTR-MD	109647109		109647109	At Iron Mountain	Add to Cart
	BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 HICKORY RIDGE DIST CTR-MD	109647112		109647112	At Iron Mountain	Add to Cart
	BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 HICKORY RIDGE DIST CTR-MD	109647113		109647113	At Iron Mountain	Add to Cart
	BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 HICKORY RIDGE DIST CTR-MD	109647120		109647120	At Iron Mountain	Add to Cart
	BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 HICKORY RIDGE DIST CTR-MD	109647124		109647124	At Iron Mountain	Add to Cart
	BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 HICKORY RIDGE DIST CTR-MD	109647125		109647125	At Iron Mountain	Add to Cart

3 Select an item, then click Add to Cart. The number of items in your cart is incremented.

4 Click the Retrievals button to open the retrieval order wizard, which steps you through the order process.

## Retrieving Stored Records

**IRON MOUNTAIN CONNECT** Welcome r2zen USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Search Search Tools 306 Search Results Help Retrievals (10)

Record Type: All Boxes Files

Customer: [RC2M] [RC2M]

Department: [All]

Status: [All]

File Group: [All]

Search

Action	Item Type	Customer	Division	Department	SKP Barcode	Alpha From	Customer Box Num...	Status	Action
	BOX	RC2M [RC2M]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647102		108647102	At Iron Mountain	Add to Cart
	BOX	RC2M [RC2M]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647103		108647103	At Iron Mountain	Add to Cart
	BOX	RC2M [RC2M]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647112		108647112	At Iron Mountain	Remove
	BOX	RC2M [RC2M]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647124		108647124	At Iron Mountain	Add to Cart
	BOX	RC2M [RC2M]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647125		108647125	At Iron Mountain	Add to Cart

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**Annotations:**

- Entries displayed in blue are clickable links. Click on the link to view the details.
- Remove records from your cart easily.
- Page through your search results.
- Change the number of records displayed on the screen.

C.

## Retrieving Stored Records

**IRON MOUNTAIN CONNECT** Welcome r2zen USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Cart Retrievals (4)

Supplies (0)

Pickups (0)

Cart: (4) Items

Retrieval Details

Review retrieval order items and specify internal billing information. Update order as necessary.

Select All Deselect All Empty Cart Add More Records Next

Customer: ABC [ABC-FOR-RC-CALC-PROJ-DO-NOT-CHANGE]

Bill To Department: DEPT A [ACCOUNTING DEPARTMENT] Apply Chargeback: MedRec038 Apply to All

Instructions: ONLY DELIVY BETWEEN 9:30-11:30AM & 2:30-5PM PO Number: 35-335-2015

At Iron Mountain

Remove More >>

Retrieval Method: Checkout

Remove More >>

Customer: RC288 [RC288] Line Items (2)

Instructions: RC288 Apply Chargeback: Apply to All PO Number:

12100013 At Iron Mountain Chargeback Item Instructions Retrieval Method

Requested for: Slackbox, an Change User

Checkout

Remove More >>

12100014 At Iron Mountain Chargeback Item Instructions Retrieval Method

Remove More >>

**Annotations:**

- Review the items on your order.
- If required, select the division and/or department that will be billed for this order. Associated instructions display.
- If this customer uses purchase orders to assign and track expenses, look up and assign an active purchase order.
- Choose your retrieval method.
- Click Next to move to the Retrieval Details step in the order wizard and enter shipping information.

d.

## Retrieving Stored Records

IRON MOUNTAIN CONNECT

RECORDS MANAGEMENT

Empty the cart and restart the retrieval process.

Return to the Search Results screen and add additional boxes/files to your order.

Enter any instructions that are specific to this order item.

Customer: ABC-FOR-RC-CALC-PROJ-DO-NOI-CHANGE

Bill To Department: DEPT A (ACCOUNTING DEPARTMENT)

Apply Chargeback: Iron038

PO Number: 10-338-2015

Instructions: ONLY DELIVER BETWEEN 9:30-11:30AM & 2:30-5PM

At Iron Mountain

Requested for: Stackboxes, etc. Charge User

Chargeback: Iron038

Item Instructions

Retrieval Method: Checkout

At Iron Mountain

Requested for: Stackboxes, etc. Charge User

Chargeback

Item Instructions

Retrieval Method: Checkout

Customer: RC2185 (RC2185)

Instructions: RC2185

Apply Chargeback:

PO Number:

At Iron Mountain

Requested for: Stackboxes, etc. Charge User

Chargeback

Item Instructions

Retrieval Method

At Iron Mountain

Requested for: Stackboxes, etc. Charge User

Chargeback

Item Instructions

Retrieval Method

Search, Retrieve

Pickups, Add Records

Bulk Upload

Order Supplies

Administration

Track Orders

e.

## Retrieving Stored Records

IRON MOUNTAIN CONNECT

10 Verify the delivery address and edit the delivery contact as necessary. Click the >Change Address link to select or create a new address.

11 Verify your shipping priority and carrier.

12 Finalize your order. Your records will be delivered as specified in your order instructions and a confirmation will be emailed.

Delivery Address

JSRC2

First Avenue

Suite 211

Address Line 3

Floor: 2

GLEN RD/DLE, PA 19037

USA

> Change Address

Delivery Contact

James Day

215634482

> Use My Contact Information

Shipping Priority

Next Day 10/12/2015 5:00 PM EDT

Scheduled by 5:00 PM on

Carrier

Iron Mountain

Customer Pickup

Third Party

Email Confirmation(s) Primary

jennifer.stackhouse@ironmountain.com

Additional Email

Order Instructions

Enter text

00 characters remaining

> Add Instructions Using Address

A message displays if any of the items on the order will be delivered by a third party carrier.

Enter the email address of user(s) who will receive the order confirmation. The primary contact receives all order-related emails. Non-primary contacts receive confirmation emails only.

Enter any instructions that are specific to this overall order.

Search, Retrieve

Pickups, Add Records

Bulk Upload

Order Supplies

Administration

Track Orders

f.

## Retrieving Stored Records

**The user(s) who will receive email confirmation for this order.**

**Return to the Search Results screen to retrieve additional records.**

**Entries displayed in blue are clickable links. Click the Order Number to track the order you just completed.**

**View order details.**

Order Number	Order Type	Record Count	Action
155526223	Retrieval	(2) Boxes	View Order
155526221	Retrieval	(2) Files	View Order
155526221	Retrieval	(1) Box	View Order

g.

## Requesting Unlisted Files

**An unlisted file is a file that is stored in a box and does not yet have an associated file record.**

**Follow steps 1 and 2 in the Retrieving Stored Records section.**

**Select Request Unlisted File from the Action dropdown of the box you need Iron Mountain to retrieve a file/files from.**

Item Type	Customer	Division	Description	Status	Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 JHC RIDGE CTR MD	At Iron Mountain	Request Unlisted File
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 JHC RIDGE CTR MD	At Iron Mountain	Request Unlisted File
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 JHC RIDGE CTR MD	At Iron Mountain	Request Unlisted File
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 JHC RIDGE CTR MD	At Iron Mountain	Request Unlisted File
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 JHC RIDGE CTR MD	At Iron Mountain	Request Unlisted File
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 JHC RIDGE CTR MD	At Iron Mountain	Request Unlisted File
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 JHC RIDGE CTR MD	At Iron Mountain	Request Unlisted File
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 JHC RIDGE CTR MD	At Iron Mountain	Request Unlisted File

h.



## Requesting Unlisted Files

**3** Enter descriptive information that will help Iron Mountain locate the file.

**4** Click Save to List. You are able to enter multiple requests for different files in the box.

**5** Click Add to Cart. Your unlisted file request is added to the cart.

**i** Edit and remove requests. For additional information on IOD and XOD requests, refer to the Requesting an IOD

File Description 1 (lock)	File Description 2 (lock)	Action
Michael Sommer 02/12/2003	Left Tibiua fracture xray 01	Action
Michael Sommer 02/12/2003	Left Tibiua fracture xray 02	Action

## Requesting Unlisted Files

**6** Continue with steps 5 -13 from the Retrieving Stored Records section to process the retrieval order containing the unlisted file request. Each request displays as a line item on the order.

**i** Your unlisted file request displays. Click the link to view, edit or remove the request.

Item Type	SKP Barcode	Customer	Department	Action
BOX	12023	JSR2 (SRVC CF,BC-B,RIIT+5)	LAW (DIVISION ONE, LAW FORMAT)	Action
BOX	12024	JSR2 (SRVC CF,BC-B,RIIT+5)	LAW (DIVISION ONE, LAW FORMAT)	Action
BOX	12025	JSR2 (SRVC CF,BC-B,RIIT+5)	MASTER DEPARTMENT DIVISION	Action
BOX	12026	JSR2 (SRVC CF,BC-B,RIIT+5)	LAW (DIVISION ONE, LAW FORMAT)	Action
BOX	12028	JSR2 (SRVC CF,BC-B,RIIT+5)	LAW (DIVISION ONE, LAW FORMAT)	Action

## Requesting Unlisted Open Shelf Files

**1** Follow steps 1 and 2 in the **Retrieving Stored Records** section.

**2** Select **Request Unlisted Open Shelf File**.

An unlisted open shelf file is a file that is stored on a shelf and does not yet have an associated file record.

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The screenshot shows the Iron Mountain Records Management interface. The top navigation bar includes 'IRON MOUNTAIN', 'RECORDS MANAGEMENT', and user information. A search bar is at the top left. Below it, there are filters for Record Type, Customer, Dept Custom, Status, and File Group. A central table lists records with columns for File Name, Division, Status, SKP Barcode, Alpha Form, Customer Box Num., and Status. An 'Action' column contains 'Add to Cart' buttons. A sidebar on the left has a 'Search, Retrieve' button and a menu with options like 'Pickups, Add Records', 'Bulk Upload', 'Order Supplies', 'Administration', and 'Track Orders'. A yellow callout box explains that an unlisted open shelf file is stored on a shelf without an associated file record.

## Retrieving Stored Records

c.

**1** Empty the cart and restart the retrieval process.

**2** Return to the Search Results screen and add additional boxes/files to your order.

Enter any instructions that are specific to this order item.

The screenshot shows the Iron Mountain Connect interface. The top navigation bar includes 'IRON MOUNTAIN CONNECT', 'RECORDS MANAGEMENT', and user information. A 'Cart' section is visible on the left. The main area shows a 'Retrieval Details' screen with a table of items. Each item has fields for 'Requested for', 'Chargeback', 'Item Instructions', and 'Retrieval Method'. A yellow callout box instructs the user to empty the cart and restart the retrieval process. Another yellow callout box instructs the user to return to the Search Results screen and add additional boxes/files to their order. A third yellow callout box instructs the user to enter any instructions specific to this order item.



## Requesting Unlisted Open Shelf Files

m.

3 Select a Customer.

4 Select one or more File Groups.

5 Click Save to List. You are able to enter multiple requests for different files in the box.

6 Enter descriptive information that will help Iron Mountain locate the file. Note that File Description 1 defaults from the Keyword field in your search.

7 Click Add to Cart. Your unlisted open shelf file request is added to the cart.

8 Edit and remove requests.

Customer	File Group	File Description 1	File Description 2	Action
ABC	OTHERS	Medical	Bob Stevens cat scan 2013	<a href="#">Edit</a> <a href="#">Remove</a>
ABC	STD GROUP	Medical	Bob Stevens x-ray 2013	<a href="#">Edit</a> <a href="#">Remove</a>

## Requesting Unlisted Open Shelf Files

C n.

8 Continue with steps 5 -13 in the Retrieving Stored Records section to process the retrieval order containing the unlisted open shelf file request. Each request displays as a line item on the order.

9 Each unlisted open shelf file request displays as a separate line item in the Items step of the retrieval order wizard. Click the link to view, edit or remove the request.

Requested for	Chargeback	Item Instructions	Retrieval Method	Action
Medical Requested for Stackhouse, et. Change User	HEDEEC	Unlisted Open Shelf File Requested from STD GROUP	Checkout	<a href="#">Remove</a> <a href="#">More &gt;&gt;</a>
Medical Requested for Stackhouse, et. Change User	HEDEEC	Unlisted Open Shelf File Requested from OTHERS	Checkout	<a href="#">Remove</a> <a href="#">More &gt;&gt;</a>
Medical Requested for Stackhouse, et. Change User	HEDEEC	Unlisted Open Shelf File Requested from OTHERS	Checkout	<a href="#">Remove</a> <a href="#">More &gt;&gt;</a>
Medical Requested for Stackhouse, et. Change User	HEDEEC	Unlisted Open Shelf File Requested from STD GROUP	Checkout	<a href="#">Remove</a> <a href="#">More &gt;&gt;</a>

# Adding and Removing Large Quantities (Bulk Actions)

**1** Select Request Unlisted File(s) to quickly request multiple unlisted files. Refer to Requesting Unlisted Files for more information.

**2** Select Add to Cart or Remove from Cart to add and remove quantities of records to and from the cart with a single click. This action will be applied to ALL selected records.

**1** Click the Select All checkbox (located at the top of the column of checkboxes) to select all records currently displayed on screen.

**1** Select multiple records. The Action dropdown above the results list becomes active.

## I. Example of Search for Corewell Health or previously Beaumont laboratory AutoTechnical Record:

**1.**

## Approval Signatures

Step Description	Approver	Date
Medical Director	Jeremy Powers: Chief, Pathology	9/12/2024
Medical Director	Muhammad Arshad: Chief, Pathology	9/5/2024

Policy and Forms Steering  
Committee Approval (if needed)

Kimberly Cole: Spec, Operations	9/5/2024
Christopher Ferguson: Dir, Lab Services	9/4/2024
Helga Groat: Supv, Laboratory	9/4/2024
Katherine Persinger: Mgr, Laboratory	8/6/2024
Kristen DiCicco: Mgr, Laboratory	8/2/2024
Ashley Beesley: Mgr, Laboratory	8/1/2024
Kimberly Cole: Spec, Operations	8/1/2024

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## Applicability

Dearborn, Taylor, Trenton, Wayne

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